



CARTA PLANS

Carta Launch Plan

Free for early-stage companies

Carta helps companies manage equity, get 409A valuations, stay compliant, and offer liquidity—from formation to IPO. More than 12,000 companies manage hundreds of billions of dollars in equity on Carta.

WHAT'S INCLUDED IN THE LAUNCH PLAN

With the Launch plan, law firms help early-stage companies get started on Carta for free. This plan is only available through law firms.

Launch

Lawyers create a company's first cap table

- ✓ **Basic cap table management**
Cap tables update automatically with every security issued.
- ✓ **Electronic securities**
Issue equity to up to 25 stakeholders, and send for board approval via Carta. Companies can raise up to \$500K on the Launch plan.
- ✓ **Law firm onboarding**
Attorneys or paralegals can set up the cap table in just a few minutes and provide companies with access to Carta.

POST-LAUNCH

Understand Carta's Premium plans

To manage more than 25 stakeholders, get 409A valuations, or add over \$500K in investor securities, companies can upgrade to a Premium plan. For more information on these plans, visit carta.com/pricing.

Launch

Lawyers create a company's first cap table

Available through law firms only

- ✓ **Basic cap table management**
- ✓ **Electronic securities**
Up to 25 stakeholders
Up to \$500K raised
- ✓ **Law firm onboarding**

Starter

Basic equity management for early-stage startups

Available directly to companies

- ✓ **Starter 409A valuation**
- ✓ **Cap table management**
- ✓ **Electronic securities**
- ✓ **Board resolutions**

Growth

Starter + additional compliance and planning features for growing companies.

Available directly to companies

- ✓ **Scenario modeling**
- ✓ **Form 3921**
- ✓ **Board meeting management**
- ✓ **Investor updates**

Enterprise

Growth + reporting, support, and IPO-readiness for companies at scale.

Available directly to companies

- ✓ **ASC 718 expense reporting**
- ✓ **Rule 701 management**

GET STARTED WITH CARTA LAUNCH

Attorneys and paralegals

- Log in to Carta, click "Add company", and fill out the company's initial cap table data.
- Add the company founder or other representative. They will get an email inviting them to log in and approve the cap table.

Companies

- Open the email from Carta and click the link to create your account.
- Review and approve your cap table. Use Carta every time you issue new securities.